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File: USPT

Aug 7, 2001

US-PAT-NO: 6272528

DOCUMENT-IDENTIFIER: US 6272528 B1

TITLE: Computer method for delivery of financial services

DATE-ISSUED: August 7, 2001

INVENTOR-INFORMATION:

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APPL-NO: 09/ 109493 [\[PALM\]](#)

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COUNTRY	APPL-NO	APPL-DATE
GB	9716290	August 2, 1997
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PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

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	PAT-NO	ISSUE-DATE	PATENTEE-NAME	US-CL
<input type="checkbox"/>	4831526	May 1989	Luchs et al.	705/4
<input type="checkbox"/>	5655085	August 1997	Ryan et al.	705/4
<input type="checkbox"/>	5850517	December 1998	Verkler et al.	709/202

<input type="checkbox"/>	<u>5862325</u>	January 1999	Reed et al.	709/201
<input type="checkbox"/>	<u>5873071</u>	February 1999	Ferstenberg et al.	705/37
<input type="checkbox"/>	<u>6009456</u>	December 1999	Frew et al.	709/202
<input type="checkbox"/>	<u>6049819</u>	April 2000	Buckle et al.	709/202
<input type="checkbox"/>	<u>6134580</u>	October 2000	Tahara et al.	709/202
<input type="checkbox"/>	<u>6148327</u>	November 2000	Whitebread et al.	709/202

FOREIGN PATENT DOCUMENTS

FOREIGN-PAT-NO	PUBN-DATE	COUNTRY	US-CL
WO 95/15635	June 1995	WO	

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Robert S. Gray, "Ph.D. Thesis proposal: Transportable Agents", Department of Computer Science, Dartmouth College, New Hampshire. May 19, 1995.*
Chavez et al., "Kasbah: An Agent Marketplace for Buying and Selling Goods", MIT Media Lab, Cambridge, MA. Jul., 1996.*
Gilbert et al., "IBM Intelligent Agents", IBM Corporation, Research Triangle Park, NC. Jan. 21, 1997.

ART-UNIT: 214

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ATTY-AGENT-FIRM: Lee, Mann, Smith, McWilliams, Sweeney & Ohlson

ABSTRACT:

A computer system is provided for delivery of financial services, such as banking, general insurance, life assurance, pensions and investments, loans and mortgages, and financial planning and advisory services. The system comprises a number of user computers connected to a plurality of server computers by way of a network, such as the Internet. The system creates at least one mobile agent which obtains details of a user's requirements, obtains financial information from the server computers on behalf of the user in the light of the user's requirements, and then transports itself to the user's computer to deliver the financial information to the user.

8 Claims, 12 Drawing figures

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